1

TOURISM LEADERSHIP CONFERENCE 2026

TBCSA
TOURISM BUSINESS COUNCIL OF SOUTH AFRICA
THE LEADING VOICE IN TOURISM

TOURISM BUSINESS COUNCIL OF SOUTH AFRICA LEADERSHIP CONFERENCE

DAY ONE: 27 OCTOBER 2026

Theme: 30 Years in Tourism Still Matters
Programme Director: Dorcas Dlamini Mbele

Summary: Day One of the TBCSA Tourism Leadership Conference 2026 started with an afternoon session examining tourism trends, key insights and reflections from SA Tourism, SATSA, the MICE industry and TBCSA.

1. Opening Remarks: Dorcas Dlamini Mbele

Summary: The challenge to industry stakeholders is to work together to elevate the sector and foster inclusive growth and the national mission. All stakeholders must understand the industry and its impact on business and the economy. The greater mission to unlock potential, create inclusive growth and position South Africa as a premier destination for leisure tourism on a global scale remains. Unlock actionable solutions to drive the strategy to achieve 15 million arrivals by 2030. The Leadership Conference offers a platform for sharing insights into the initiatives being put in place to ensure the industry meets its goals.

2. Siyabonga Mthethwa: Chief Strategy Officer - South African Tourism

Topic: *Tourism market insights: What has changed since last year?*

Summary: Siyabonga Mthethwa, Chief Strategy Officer at South African Tourism, discussed shifting trends and strategies within the tourism industry. Mthethwa reflected on the issues discussed at the 2025 Leadership Conference and explored how best to usethe data from travel trends.

Key Insights:

- **Geopolitical Impact:** What has changed since the 2025 Leadership Conference? The conflict in the Middle and the closure of the Strait of Hormuz disrupted the marketing plans set last year. The industry has had to pivot its strategies due to unforeseen global tensions and conflicts that disrupted initial growth plans.
- Airlift has been disrupted, seat capacity is lower and the oil price has skyrocketed. SA is still looking at growth, but with a focus on other markets.
- The travel trends show a growing preference for relaxation and disconnection (with some travellers requesting to be 'off the grid'), a rise in 'skip-generation' travel (grandparents with grandchildren), solo travel, and a focus on 'quiet tourism' in urban settings.
- Artificial intelligence is becoming integral to the traveller's journey, from planning and booking to personalised on-the-ground experiences. South Africa is working on its own AI tool, Siyanda, to encourage geographic spread and visitor exploration across different provinces.
- While focusing on established priority markets, South Africa is exploring new opportunities in regions like Indonesia, Malaysia, and South America to reach growth targets. There are some markets where more work still needs to be done.
- The Cricket World Cup provides an opportunity to grow the industry during and beyond the tournament. Indian travellers mainly rely on AI in making decisions about travel. Unlocking growth in that market requires accurate profiles of Indian travellers and understanding how to lure them to SA.

Five shifts that could redefine leisure travel:

- Personalised experience, authentic camping, passion, depth and geographical spread
- 57 MICE-related bids supported. SA secured 16 of the bids, worth close to R100m. The focus of business events (MICE) is shifting toward hosting more conferences in small towns, townships, and villages to drive local economic development and infrastructure improvement.
- The need to produce more credible, positive data and stories about South Africa to improve international perceptions regarding safety and the destination's appeal was also highlighted.

3. Sithembile Ndaba – Chief Marketing Officer, South African Tourism

Topic: *South Africa's destination brand and international perception*

Summary: Sithembile Ndaba, Chief Marketing Officer

at South African Tourism, discussed the brand Destination South Africa and how it is perceived internationally. Ndaba highlighted the power of storytelling in destination marketing. She also noted the importance of seeing countries as brands, fighting for commercial interests and the wallets of people.

Key Insights:

- Ndaba identified what she called leakages from a brand performance point of view, one of which is the declines in positivity. If the perception of the country is not positive, that challenge needs to be fixed from a brand funnel.
- The second 'leakage' is in the traveller purchase journey. Where should travellers to South Africa go to? Ndaba notes that there needs to be a geospread of the complete tourism offering in South Africa and clarity regarding regional value propositions.
- **The Brand Funnel:** Ndaba explained the importance of viewing the country as a commercial brand, moving travellers through a funnel from awareness to trial, repeat visits, and finally, strong brand equity.
- SAT is transitioning to an era where they are working very closely with all provincial DMOs to craft their unique selling propositions so that they are not duplicated.
- Through the segmentations conducted, it has emerged that from source markets such as India, parts of Europe and China, South Africa is losing some travellers.
- The losses in the number of travellers to SA have also been recorded globally as well as in African regional markets.
- **Advocacy is important.** Getting the people who have travelled to the country to share their authentic experiences so that they can debunk or bridge the gap between reality and perception.
- Leverage the country's natural assets, sport culture heritage and art in strategies, and continue to punt on affordability, as well as the country's diversity.
- **Strategic Focus:** Ndaba emphasised the need for better coordination across the tourism ecosystem, correcting the narrative around barriers like safety, and leveraging the "country of origin" effect to drive both tourism and trade.
- **Target Markets:** A priority for the future is regaining market share in India and China, while defending key African markets and identifying new high-spend travellers from countries like Saudi Arabia and Brazil.
- Ndaba concluded by linking South African tourism to the philosophy of Ubuntu- the idea that "I am because we "are"- advocating for a service-orientated approach that reflects the country's unique identity.

4. David Frost – CEO, SATSA

Topic: *Marketing South Africa Internationally: Progress since 2025*

Summary: David Frost, CEO of SATSA and TBCSA board member, focused on strategic initiatives to drive international tourism to South Africa. He detailed the unified strategy between the private sector and SA Tourism to drive international tourism toward the national target of 15 million international arrivals by 2030.

Key Insights:

- Frost emphasised that there are no "quick fixes". Success requires consistent, systematic effort over multiple years to achieve sustained double-digit growth.
- Data indicating current performance showed that South Africa is reaching roughly 95% of its 2019 tourism levels. While traditional markets like the USA and UK have shown strong recovery, emerging markets like India and China have underperformed.
- Frost highlighted that previous arrival data was overstated by approximately 12.5% due to double-counting visitors who travel between South

Africa and neighbouring countries.
- Efforts are ongoing to optimise the electronic travel authorisation (ETA) system and improve air access, especially for the critical Chinese and Indian markets where performance has lagged significantly compared to competitors like Australia.

Five-Pillar Strategy: The TBCSA's destination marketing plan centres on:

1. **Target market development:** Focusing on the top six global markets and three potential growth markets (the Middle East, Mexico, and Brazil).
2. **Sector development:** Targeting niche sectors like MICE, adventure, golf, youth, and film.
3. **Brand and competitiveness:** Leveraging high-impact campaigns and new technology.
4. **AI integration:** Utilising artificial intelligence to improve geographical spread of tourists.
5. **Special events:** Capitalising on major upcoming opportunities, such as the 2028 Pride event, the 2027 Cricket World Cup, and the Adventure Travel World Summit.

- **Phase 3 Government-Business Targets:** The partnership set targets to grow gateway air arrivals from 3.05M (2025) to 3.8M by Dec 2027 (+750k visitors) and land/sea arrivals from 7.5M to 8.1M (+8%).
- Reaching the 3.8M air target requires a ~11.7% compound annual growth rate over 2026 and 2027.
- **Electronic Travel Authorisation (ETA) Delays:** Early onboarding of key priority markets into the ETA system in November 2025 has not yet translated into positive momentum. Arrivals from Mexico (-61.7%), India (-29.8%), Indonesia (-23.9%), and China (-23.4%) are all tracking below 2025 levels in 2026 YTD.
- Historical analysis (2007–2025) shows direct air routes are necessary but insufficient on their own. Demand recovery, trade education, and indirect connectivity often drive volume more than direct flights alone.
- **TOMSA Funding & "Bomb Squad" Model:** Private sector 1% TOMSA levies provide voluntary, supplementary firepower without drawing on the government fiscus.
- **Adventure, Golf & Youth Tourism:** Sub-brands created under the "Travel South Africa – One Country. Many Experiences" umbrella. Dedicated trade engagement platforms (WYSTC, IGTM, ATWS) and specialised itineraries are underway.
- Rollout of global brand campaigns (including the Trevor Noah Campaign 2) and launching the new travelsouthafrica website alongside an upcoming National Tourism AI Framework.

5. Tshifhiwa Tshivhengwa – CEO, TBCSA

Topic: *Domestic tourism marketing: How we are selling tourism to South Africans*

Summary: Some of the commitments from the 2025 Leadership Conference were to invest funds towards destination marketing and to amplify the marketing of South African products to South Africans to stimulate local travel. Two complementary campaigns were launched between the 2025 and 2026 Leadership Conferences. The Trevor Noah: Don't Say We Didn't Tell You campaign for the international market was launched in July. Earlier this week, Just Travel SA – a nine-episode travelling show targeting South Africans travelling at home – was launched on SABC 1.

Key Insights:

- The international campaign supports the ambition of growing international arrivals to 15 million by 2030.
- The domestic campaign highlights affordable experiences across all nine provinces.

Outcomes of the International Campaign so far:

1. 47.2 million people reached across the target markets.
2. 106.9 million impressions: the number of times

messaging appeared on screens.
3. 122.4 million video views: the notes indicate that some viewers watched more than once.
4. 4.6 million engagements: likes, comments and shares.
5. 1.16 million clicks to the SAT website.
6. 72% growth in impressions in the "last month", as described in the notes.
7. 70% growth in daily website clicks in the "last month", according to the closing summary in the notes.

- These are indicators of awareness and interest, not evidence of increased bookings, trips or arrivals.
- The Trevor Noah: Don't Say We Didn't Tell You campaign is targeted at 12 target markets: Spain, Canada, Brazil, the USA, China, India, Singapore, Germany, the UK, West Africa, East Africa and France. West Africa and East Africa are regional markets rather than individual countries. Its distribution spans YouTube, TikTok, Meta, Google Display and X.

Market highlights and ETA messaging

- Germany: the highest reported engagement rate among the 12 markets, at 5.12%.
- United Kingdom: the most website clicks, at 162,000, followed by China with 149,000.
- Spain: 11.1 million impressions and 494,000 engagements, described in the notes as the highest market totals on these measures. Impressions should not be interpreted as unique audience reach.

The domestic campaign:

- The first episode of Just Travel SA was broadcast on SABC 1 on 27 October 2026.
- Objective: to encourage South Africans to travel by showing affordable experiences across the country. The campaign covers Northern Cape, Western Cape, Gauteng, Mpumalanga, Eastern Cape, North West, Limpopo, Free State and KwaZulu-Natal.
- Affordability positioning: this showcases what travellers can explore between the R1,050 and R1,250 price points.
- South African consumers are cutting discretionary spending, including travel. So, the different price tiers communicate different experience levels.

Early teaser performance:

1. 1.70 million impressions before the first episode.
2. 1.26 million video views.
3. 508,000 engagements: likes, comments and shares.

6. Glenton de Kock – CEO, SAACI

Topic: *MICE sector performance: Progress since 2025*

Summary: South Africa's business events strategy centres on sustained international visibility, measurable conversion and a wider geographical distribution of benefits. De Kock emphasised that participation in international trade platforms must translate into events delivered in South Africa, rather than visibility alone. Business events generate direct spend across venues, accommodation and transport, alongside knowledge exchange, legacy benefits and market confidence.

Key Insights:

- The return on investment from the R1.5m received from the TOMSA funding in 26-26 is between R11.5 million and R19.2 million in direct spend linked to IMEX America participation.
- Secured bids for 2027–2030 are expected to attract 22,800 international delegates and generate approximately R705 million in economic impact.
- It is crucial for SA to maintain a credible presence in priority markets, reduce uncertainty through targeted site inspections and qualified opportunities, and deliberately extend business events activity beyond the three main city hubs.
- Part of the strategy is to spread benefits beyond the main hubs through regional routes, local suppliers

and tracking delivery spend and geographical reach.

- Tracking every TOMSA rand from the show floor to events delivered in South Africa makes accountability a core part of the strategy. Market presence matters, but its value must be demonstrated through qualified opportunities, successful bids and delivered events.
- **Targeted support can reduce decision-making uncertainty.** Site inspections and support for qualified requests for proposals (RFPs), backed by clear conversion plans, are intended to help turn interest into bookings.
- **Regional inclusion requires practical packaging.** Extending benefits beyond the main cities depends on connecting regional routes and local suppliers to business event programmes. Tracking actual spend and reach is necessary to establish whether this geographical spread is being achieved.
- **The value proposition extends beyond immediate spending.** Venues, accommodation and transport receive direct economic benefits, while knowledge exchange and legacy outcomes form part of the wider social value.
- **Coordination supports delivery.** Better communication between associations, ongoing working groups, project management and governance are recurring themes. An industry calendar planned well in advance would support the sustained, coordinated presence described in the notes.

Niche Market Growth: Hannelie du Toit, COO of SATSA, outlined strategies for four high-potential niche sectors: adventure tourism, youth travel, golf, and film tourism. These sectors are identified as key drivers for regional spread and sustainable growth, with a specific focus on self-regulation, building industry standards, and adapting to modern traveller behaviours (e.g., Gen Z preferences).

Leveraging Technology: David Ryan, Founder and CEO of Rhino Africa Safaris, discussed the role of artificial intelligence as the next great disruption in travel. The TBCSA aims to build an AI-powered knowledge ecosystem that connects local insights and business expertise, allowing the world to rediscover the full breadth of South Africa's tourism offerings beyond traditional hotspots.

7. Kagisho Bapela – Head of Tourism, IDC

Topic: *Financing Tourism Growth and Enterprise Development*

Summary: Kagisho Bapela, Head of Tourism, as the Industrial Development Corporation (IDC) outlined that the IDC invests in the tourism value chain, with a particular focus on leisure accommodation and tourist attractions that enhance the South African visitor experience. The IDC's proposition extends beyond providing capital. It combines sector insight, project preparation, finance, partnerships and governance to help turn tourism concepts into investable propositions and mobilise the wider financial ecosystem.

Key insights:

- **More than a lender:** The IDC seeks to prepare projects, provide finance and mobilise partners rather than simply fund an individual asset.
- **Destination connections matter:** The briefing favours financing tourism nodes rather than isolated assets. Investment readiness improves when the components of a destination connect.
- **Several routes to investment:** Support spans greenfield developments, brownfield expansion or refurbishment, and acquisitions linked to new entrants and industrialists.
- **Capital must fit the project:** financing should reflect the asset and its cash flow.
- **Development impact should be intentional:** ownership, employment, enterprise development,

place-based benefits and resilience are presented as considerations to build into transactions.

- **Evidence determines readiness:** A clear commercial case, a complete capital stack, technical readiness, operating capability, compliance and governance underpin a funding-ready application.
- Leisure accommodation and tourist attractions were identified as the core investment focus, with hotels, apartment hotels, resorts, lodges and guest houses among the opportunities considered. Its stated mandate covers greenfield investment, expansion, refurbishment and acquisition.

These activities are grouped into three investment pathways:

1. Greenfield development: Creating new tourism products and accommodation assets.
2. Brownfield investment: Adding capacity to existing operations or refurbishing assets.
3. New entrants: Supporting acquisitions and opportunities for industrialists to enter the tourism value chain.

- IDC focuses on reinforcing the relationship between destination creation, visitor demand and local procurement, with an anchor investment opening multiple channels for development.
- Development outcomes are framed around ownership, employment, enterprise development, place and resilience.

The six elements of application readiness: Together, these establish the evidence needed to assess whether a concept is ready to progress towards investment.

1. a credible commercial case
2. a complete capital stack showing the proposed funding mix
3. technical readiness
4. operating capability
5. compliance
6. governance.

The funding application process involves:

1. Screening
2. Pitching
3. due diligence
4. Approval
5. Contracting
6. Disbursement
7. Monitoring

- The message to prospective applicants is to engage early with a specific, investable proposition and supporting evidence. Early engagement is presented as the start of an assessment process but is not a guarantee of approval.

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